Financial Planning Associate

Paladini Financial Advisors, LLC in Arlington, TX seeks a Financial Planning Associate to join our team. We provide our clients fee-only, comprehensive, holistic, financial planning and investment advisory services primarily for healthcare professionals.

We are seeking a dynamic team player who wants to be part of a successful team, is enthusiastic about helping people make the most meaningful use of their personal and financial resources, is willing to start from the ground up to learn our business, and is looking for a tremendous career growth opportunity to develop into a primary client service advisory role in the future.

Key Areas of Responsibilities:

- Provide support to Advisors for comprehensive financial planning services to clients by gathering data, developing financial plan analysis and scenarios, packaging and posting meeting materials, and managing meeting notes and follow up action items
- Construct financial and retirement projections using Easy Money planning software
- Utilize Fidelity Wealthscape portal for client asset management and rebalancing as necessary
- Assist Financial Planner in the analysis of estate plans, retirement plans, tax planning, and insurance needs
- Participate in client meetings and support Advisor in capturing client wishes via meeting notes and delivering follow up planning strategies
- Create deliverables for prospective client meetings and existing client review meetings
- Continually monitor clients' financial situations with detail and accuracy within Redtail CRM
- Be available to field ad hoc planning questions from clients
- Assist with internal work flow system upgrades and development
- Assist in helping complete follow-up and action items for clients
- Other projects and research at the discretion of Advisors, including research assignments and execution of internal initiative tasks

Key Traits and Attributes:

- Demonstrated passion for the Financial Planning profession
- Someone who lives for organization and structure yet is a creative thinker
- Holds or is working towards the CFP® certification
- Strong service orientation to delivering high quality experiences
- Strong financial and analytical skills
- Must be a self-starter, problem solver and a goal-oriented team player with a 'no job is beneath me' attitude
- Able to work independently
- Organized, with a strong attention to detail
- Able to perform multiple tasks efficiently
- Ability to make effective decisions using impeccable ethical judgement
- Engage in continuous learning to ensure currency of knowledge and skills
- Knowledge of Microsoft Office suite. Experience with Easy Money, Redtail or similar CRM software package a plus
- Sense of humor is a must
- Education: Bachelor's degree

Experience: Recent grad to three years of experience in dedicated financial planning position

Please apply to info@paladinifinancial.com.